**NATIONAL RESEARCH ON EDUCATION GAPS AND DOMESTIC FINANCING IN ZAMBIA**

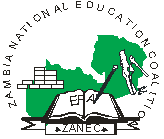
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The views expressed in this document are those of the researcher.

The researcher has gone to great length in trying to ensure that the information contained in this document is as was provided by the various sources. However, should there be any errors or misstatements, please contact the undersigned.

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# List of Abbreviations

|  |  |
| --- | --- |
| BESSIP | Basic Education Sub-Sector Investment Programme |
| CSO | Central Statistical Office |
| CSOs | Civil Society Organizations |
| ECCDE | Early Childhood Care, Development and Education |
| EFA | Education for All |
| GDP | Gross Domestic Product |
| GRZ | Government of the Republic of Zambia |
| IMF | International Monetary Fund |
| IOB | Operations Evaluation Department |
| JAS | Joint Assistance Strategy |
| LCMS | Living Conditions Monitoring Survey |
| MDGs | Millennium Development Goals |
| MOE | Ministry of Education |
| MOESP | Ministry of Education Strategic Plan |
| MTEF | Medium Term Expenditure Framework |
| NER | Net Enrollment Ratio |
| NIF | National Implementation Framework |
| UN | United Nations |
| UNDP | UN Development Programme |
| UNESCO | UN Educational, Scientific and Cultural Organization |
| UNICEF | UN Children’s Fund |
| ZANEC | Zambia National Education Coalition |

Executive Summary

The purpose of the study was to analyse current trends in progress towards achieving full enrolment, retention and quality education in Zambia and examine the situation of domestic education financing. This was in order to identify education gaps and financing opportunities and constraints that need to be carefully considered for optimising domestic revenue mobilisation towards inclusive quality education beyond 2015. The reference period for the study was 1990 to 2014 for the analysis related to education gaps while the focus of the analysis on domestic education financing was the period 2010 to 2014. This was the period of implementation of the Education for All (EFA) Plan of Action and the Millennium Development Goals (MDGs).

The research found that major educational infrastructural investment programmes embarked on since the mid-1990s significantly improved the numbers of those attending basic level (primary and junior secondary) education. The absolute number of students in primary education more than doubled between 2000 and 2014, increasing from 1.6 million in 2000 to 3.7 million in 2014. The Net Enrolment Ratio in primary education increased from 80 percent in 1990 to 94.3 percent in 2014 while the proportion of pupils reaching grade 7 increased from 64 percent in 1990 to 86.2 percent in 2014.

However, issues of quality of education did not receive much attention. Overcrowding in classrooms and high pupil-teacher ratios persisted. The sustainability of the free primary education policy remained questionable due to associated operating costs at school level while post-basic education appear not to have received the necessary attention required in terms of expansion, rehabilitation, educational material support and curriculum review. Achievements in pupil performance also remained low, particularly in reading and mathematics while there continued to be persistent mismatches between the skills coming out of the education system and the needs of the labour market. Gender gaps while almost eliminated at primary level continued to exist at post-primary school level urging the need for sustained efforts.

On financing, it was found that the allocation to the education function remained in the region of 18 percent for the period 2010-2014 which fell short of the Education for All Fast Track Initiative(EFA-FTI) that prescribe a benchmark of at least 20 percent of the total expenditure budget to be allocated to the educational sector. An outstanding concern with respect to allocation to the education function was that much of the resources were, in real terms, concentrated on the first two-tiers of education i.e. primary education and secondary school. Early child development and tertiary education sectors were not prioritised. The funding role of Government in skills development and early childhood development remained rather on the weak side throughout the EFA/MDG reference period. A related concern was the observed variance between allocations and actual disbursements to the education sector. It was found that actual outturns on expenditures on education during the reference period (2010-2014) were less than the budget profiles approved.

The report makes the contention that improvements in national revenue collection would benefit the education sector as more resources would be available for educational financing. To this end, Government will need to put in place mechanisms (some very basic, others more innovative) to expand its tax base. It was observed that a lot of tax goes uncollected especially in the informal sectors. Concessions extended to large scale investors would need to be reviewed so as to ensure that the net effect is not merely a loss in tax revenue. The mining sector stood out as one that needed specific attention to harness its potential for revenue generation.

**Recommendations**

On the basis of the key findings, the following recommendations were made:

**1. Education gaps**

* **Balanced Approach**

To further improve the Grade 7 completion rate, government needs to secure greater balance between interventions that focus on improving educational access and gender parity in enrolment, on the one hand, and those that address retention and completion rates, on the other.

* **More investments in secondary and post-secondary school infrastructure**

Although the completion rate for Grade 12 has been improving rapidly since 2009, primarily due to major improvements in school infrastructure, it is still very low. Enhancing this will require massive investments in the construction of secondary and post-secondary educational facilities, and higher recurrent budgets for the provision of books, laboratory and computer equipment.

* **Quality of Education**

Quantitative improvements in education outcomes, while necessary, are not sufficient. Improved enrolment and progression rates should be accompanied by quality teaching staff and upgraded school facilities to improve the overall quality of education.

* **Youth Illiteracy**

To address illiteracy and skills development, government must work with its stakeholders and partners, including civil society organizations, private sector, academia and parent-teacher associations in pursuing policies and programmes that improve youth literacy rates, especially for females. Civil society has experience in designing flexible programmes for specific community groups, lobbying for the interests of vulnerable populations and monitoring performance. The private sector has a particular interest in an educated workforce and must be encouraged to offer more apprenticeship programmes, as well as workplace literacy and skills development

* **Higher Education**

To address the skills mismatch, Government must focus increased attention on higher education.

* **Quality and use of monitoring information**

The monitoring and evaluation functions need to be further expanded in order to become instruments for the improvement of the quality of education. In this regard, monitoring and evaluation functions need to be expanded in order to become instruments for the improvement of the quality of education. Information provided by the annual school census needs to be linked with information from the Examination Council of Zambia. At the district level, the results of inspections must be computerised and linked to the education management information system (EMIS) data. The evaluation capacity of the Directorate for Planning and Information needs to be strengthened and in order to fill existing gaps, the EMIS capturing of information must be extended to private institutions.

* **Working in partnership with CSOs**

To address illiteracy, government must work with its stakeholders and partners, including Civil Society Organizations, private sector, academia and parent-teacher associations in pursuing policies and programmes that improve youth literacy rates, especially for females. Civil society has experience in designing flexible programmes for specific community groups, lobbying for the interests of vulnerable populations and monitoring performance. The private sector has a particular interest in an educated workforce and must be encouraged to offer more apprenticeship programmes, as well as workplace literacy and skills development.

1. **Domestic financing**

The following measures would help improve revenue levels and make more resources available for quality inclusive education development:

* **Tapping into diaspora remittances**, this is an area that holds potential but is currently untapped in the Zambian case. Policy makers and the development community could explore ways to exploit this potential to leverage savings and investment in productive assets. However, more effort is needed to maximise their development impact, including by reducing their transmission costs and channelling remittances through national commercial banks to access additional finance.
* **Curbing illicit financial flows from Zambia**, which are estimated to have exceeded FDI and ODA at the continental level over the last decade, are a potential source of domestic resource mobilisation for the national economy. If curbed, they could free up resources to invest in public goods such as education.
* **Combating tax avoidance through improved monitoring capacity**. The combination of a huge informal sector, low levels of tax collection, high rates of tax evasion (low tax payer morale) and a weak tax administration all add to the challenge of fiscal reform for inclusive development. Zambia though a resource-rich countries lack the capacity to negotiate contracts, which would promote greater transparency and improve public revenue from the extractive sector. Abusive transfer pricing – the artificial movement of taxable profits from high-tax to low-tax jurisdictions – occurs on a substantial scale in Africa and there is every reason to believe it occurs in Zambia. The country should strengthen its monitoring capacity to combat tax avoidance in all its forms, particularly to curb strategies defined as “base erosion and profit shifting” (BEPS), which exploit gaps and mismatches in tax rules to shift profits for tax purposes.
* **Increasing the contribution of resource rent**, e.g., raising mineral royalty tax to realist levels.
* **Implementing property tax to expand tax base**, particularly to capture informal sector incomes.

# 1.0: Introduction

1.1 Background to the Study

In 2000, at the World Education Forum in Dakar, the international community pledged to among others, achieve six Education for All (EFA) goals by 2015. These EFA goals were: (i) expanding and improving comprehensive early childhood care and education, especially for the most vulnerable and disadvantaged children; (ii) ensuring that by 2015 all children, particularly girls, children in difficult circumstances and those belonging to ethnic minorities, have access to and complete, free and compulsory primary education of good quality; (iii) ensuring that the learning needs of all young people and adults are met through equitable access to appropriate learning and life-skills programmes; (iv) achieving a 50 per cent improvement in levels of adult literacy by 2015, especially for women, and equitable access to basic and continuing education for all adults; (v) eliminating gender disparities in primary and secondary education by 2005, and achieving gender equality in education by 2015, with a focus on ensuring girls’ full and equal access to and achievement in basic education of good quality; and, (vi) improving all aspects of the quality of education and ensuring excellence of all so that recognized and measurable learning outcomes are achieved by all, especially in literacy, numeracy and essential life skills (Dakar Framework of Action, 2000:2).

It was reported that at that time, 99.8 million children of primary school age across the globe (including some 41 million in Sub- Saharan Africa) were out of school (UNESCO, 2000). In the same year, the United Nations adopted the eight Millennium Development Goals (MDGs), two of which were complimentary to two of the EFA goals - one on universal primary education (MDG2) and the other on achieving gender parity in schools (MDG3) ( UNDP, 2000). Like the EFA goals, the MDGs were supposed to be achieved by 2015.

At the close of 2015, it was estimated that as many as 57.8 million children of primary school age across the globe (between 6 and 11 years of age) had never been to school or were out of school. Another 62 million had some schooling, but dropped out of school before completing primary school. Moreover, at the beginning of 2014, the world learnt of the global learning crisis, as UNESCO (2014) estimated that out of the world’s 650 million primary school-age children, at least 250 million were not learning the basics in reading and mathematics. In addition to the 57.8 million out of school and 62 million who had dropped out, another 130 million young people were reaching grade 4 without being able to read or write a sentence or add two numbers (ZANEC, 2015). In Sub Saharan Africa, only two-fifths reach Grade 4 and achieve the basics. Given these facts, a number of countries missed both the EFA goals and the MDGs at the end of 2015, especially in Africa.

One of the major challenges faced by many developing countries, especially in Sub-Saharan Africa has been the financing gap. Although the governments and the international community pledged sustainable funding for EFA in 2000, failure to fulfill pledges has led to a huge funding gap estimated at US$16 billion annually (UNESCO, 2012). Most countries in Africa are unable to provide the international target of allocating 6 percent of the Gross Domestic Product (GDP) or 20 percent of the national budget to education. Globally, aid to basic education has also assumed a downward trend in the recent past. Unfortunately, the forecast for global aid for the coming years looks bleak as many donor countries are expected to cut aid (OECD, 2014).

The ensuing challenges in the global aid architecture means that developing countries have to focus on identifying and investing more in domestic sources of financing and improving governance and accountability frameworks in order that funds meant for education can reach the intended beneficiaries. Within this context, there would be need to identify the critical areas of education that should receive priority funding despite existing budget constraints. Civil society organizations and other interested actors are seeking to engage policy makers and implementers in constructive and structured dialogue on these matters but have lacked the commensurate evidence to support their policy positions and advocacy messages. To do this, they need to gather updated information on the situation of education and financing pertaining to the period of EFA/MDG implementation. This will then enable them identify key challenges and opportunities for improving education outcomes and ways of mobilizing domestic resources. Against this background, the Zambia National Education Coalition (ZANEC) commissioned a national-wide desk study to understand Zambian educational gaps and domestic financing to provide the evidence base for articulating policy positions and for informing advocacy agenda.

## 1.2 Research Questions:

The subject of education gaps and financing is broad, beyond the resources and time currently available. The scope of the study was, therefore, restricted to answering the following four key questions:

(1) What are the current trends in progress towards achieving EFA/related MDGs in Zambia and what gaps remain?

(2) What have been associated patterns and mechanisms in domestic education financing of EFA/related MDGs in Zambia?

(3) What options exist for optimising domestic revenue mobilisation for the advancement of inclusive quality education in Zambia?

(4) What policy and action-focussed interventions are required to ensure inclusive quality education in future?

1.3 Objectives of the Study

The overall objective of the study was to understand education gaps and associated domestic financing patterns in the context of EFA/related MDGs in Zambia. The underlying motivation was to provide evidence for articulating policy positions and an informed civil society advocacy agenda. More specifically, the study’s objectives were as follows:

(1) To identify and analyse gaps in progress towards achieving education for all and related MDGs in Zambia.

(2) To examine patterns and mechanisms of domestic financing of education in Zambia.

(3) To identify policy options for optimising domestic revenue mobilisation for the advancement of inclusive quality education in Zambia.

(4) To recommend action-focussed interventions and strategic communication messages for informing a civil society advocacy agenda on inclusive quality education in the context of agenda 2030.

## 1.4 Methodology of the Study

### 1.4.1 Methodological Framework

The study was anchored in the updated UNICEF SitAN Model (2013) that adopts a human rights framework and assumes that rights are interdependent and interrelated. The realisation of one right often depends, wholly, or in part on the realisation of others. Given that a key objective of the study was to provide a situation analysis around education and the financing of it in Zambia, the methodological process followed along the steps indicated in the UNICEF’s guidance on conducting Situation Analysis of Children and Women’s Rights (2011), and used some insights from its Global Assessment on Situation Analysis of Children and Women’s rights (2012).

Thus, in the first instance, the study conducted an assessment of how contextual factors (i.e., economic, social and political) influence education outcomes in the country. Second, the study conducted assessments of the manifestations of education gaps and inequalities in access to education, based on the materials available in the country during the EFA/MDG implementation period. This involved an analysis of current trends in progress towards achieving full enrolment, retention and quality education for marginalised children. This was then followed with an analysis of current trends in the size, sources and priorities of domestic education financing with a view to assessing their adequacy towards achieving full enrolment, retention and quality education for marginalised children and the achievement of EFA/MDGs and Education 2030. Altogether, the focus was on identifying critical education gaps and challenges in education financing, to tell the story, to explain the situation of marginalised children as it exists.

As such, the model of analysis used placed the situation of marginalised children in a system that is influenced by (i) contextual factors, represented by population, economic and social factors that frame the situation; (ii) supply-side factors, represented by the availability of educational services, budgets and adequate means to realise full enrolment and retention; (iii) demand side factors, representing common knowledge, attitudes and practices at community level; and (iv) personal factors, representing individual wishes, aspirations, education status among other aspects (See Figure 1).

**Figure 1-1: Zambia Updated SitAn Model**

**Contextual factors**

-economic

- Political

- Institutional

-legal and administrative

- Environmental

**Supply-side factors**

* Budgets
* Efficiency of services
* Adequacy of targeting

**Demand side factors**

-Knowledge, attitudes and practice

-cultural constraints, cots, time, availability etc

**Situational of women and children**

**Personal factors**

-Social economic status

- Health & education

- Place of living

**Source**: Based on Bamberger and Segone (2011, quoted in UNICEF, 2013)

### 1.4.2 Main Data Sources and Analysis

By design this was a desk study anchored on content analysis of official secondary data. Thus, all the data utilised in the study came from official government sources, international agencies and other studies. Specifically, data used to analyse trends and gaps in progress towards achieving education for all and related millennium development goals mainly came from the Ministry of Education’s Educational Statistical Bulletins for the period 1990 – 2014 and completed by data from the Central Statistical Offices’ 2010 Census of Population and Housing (2012). Data used to analyse patterns, trends and gaps in domestic education financing was mainly drawn from the Ministry of Finance’s National Budget Speeches (2010-2014), the Ministry of Finances’ Estimates of Revenue and Expenditure (Yellow Books) for the period 2010-2014, the Ministry of Finance’s Financial Reports (2010-2014) and the African Development Bank (AfDB) online budget database for African. Content analysis of documents obtained was carried out based on main research themes. At the back of the mind during content analysis was the limitation of secondary data in that parties and institutions with their own biases might have collected it for other purposes.

Limited key informant interviews were conducted to complement the bulk of content analysis on which the study was anchored, however. These key informant interviews were conducted with officials from the Ministry of Education’s Planning and Information Department at Headquarters in Lusaka, the Ministry of Finance’s Budget Office and the Zambia National Education Coalition Secretariat to seek clarifications on some areas that might not have been apparent from secondary data sources. The draft report was then subjected to a validation workshop at which a broad section of about twenty (20) education stakeholders (mainly from Government, Civil Society Organisations and representatives of Zambia’s International Co-operating Partners) were able to give their feedback before the report was finalised. The feedback sessions during the validation workshop strengthened the overall understanding and increased the researcher’s ability to interpret findings and package them in a way that could most aptly translate findings from the language of research to the realm of action.

# 2.0: Contextual Factors Influencing Education in Zambia

## 2.1 Population Factors

Zambia has an estimated population of over 14 million people[[1]](#footnote-1). Despite the country still sparsely populated, with a population density of 17.4 persons per km2 in 2010, the country has a very young population and a high population growth rate (CSO, 2012). Latest census data estimates the child population (18 years and younger) at 52.5 percent (about 7.5 million) of the overall country population and an annual population growth rate of about 2.8 percent (CSO, 2012). The size, growth rate and age composition of Zambia’s population have been important factors influencing education provision in Zambia. Given that the country has a very young population, Cincotta (2010) has noted that this often implies a rapidly growing school age population. This dynamic is in turn associated with high demand on educational provision (Kelly, 1991:24).

According to Kelly (1991), the rapid growth of the population has had the most serious implications for educational provision in Zambia. In 1980, there were 1.33 million children of primary school age (7 to 14year-olds), and the primary school enrolment was 1.04 million (Kelly, 1991:24). By 1985, there were some 1.50 million primary school aged children and 1.35 million school places. By the year 2000, the number of school aged children was at 2.64 million while school places had not significantly grown beyond 1.3 million for seven full years of primary education. At the end of 2014, there were some 3.6 million primary school aged children and less than 3 million school places. In this respect, policy-makers need to consider mainstreaming population as a cross-cutting theme in all education sector policies and operations to achieve sustainable quality education development.

## 2.2 Economic Factors

Economic factors play a critical role in education provision in Zambia. Since independence in 1964, the Zambian economy has relied strongly upon a single natural resource namely, copper. When high world market copper prices started to decline in 1973, the Zambian economy did the same and so did budget allocation to critical social sectors such as education.

Kelly (1991:24) notes that, “following the economic decline of the mid-1970s, the level of capital investment in education declined sharply, with real spending in 1985 being only about one-tenth of that in 1975”. Education capital expenditures (at constant 1975 prices) declined from K22.60 billion in 1975 to K2.26 billion in 1985 (Kelly, 1991:24). This occurred at a time when total public investment was falling steadily in relation to the Gross Domestic Product (GDP). Capital investment in education as a proportion of GDP declined substantially from a proportion of 0.76 percent in the period 1975-79 to 0.35 percent in the period 1981-85 (Kelly, 1991: 25).

In other words, once the economic recession took hold, the funds to meet planned education investment targets were not available. For instance, during the period of the Third National Development Plan (1979-83), actual expenditure was only some 40 percent of the planned total (Ibid). This sharp drop in educational investment occurred at a time when enrolments were increasing rapidly. During the period 1975-77, an increase of 78,626 in primary school enrolment was made possible by an investment of K7.8 million (at 1975 prices). During the subsequent five years, 1978-82, the enrolment grew by a further 184,952, but the investment fell to K4.6 million. During the period 1983-85, an enrolment increase of 226,920 was sustained by capital expenditure of no more than K0.3 million. In other words, the investment at the primary level fell from K99 per additional place in 1975-77 to K1.3 in 1983-85; a drop of more than 98 percent.

Throughout the 1980s and 1990s, economic stress and a heavy debt burden[[2]](#footnote-2) forced the Government of the Republic of Zambia (GRZ) to cut budgets for education. Real expenditure on education dramatically declined between 1984 and 1995 (White and Dijkstra, 2003:426). In 1998, per capita expenditure for pupils at the primary school level was only USD17, which is half the amount of 1985 (MoE, 2007).

At the turn of the century, average real government expenditure on education (per capita) was no more than about 60 percent of the level at the beginning of the decade (Das et al., 2004). This underfunding of the education sector led to cuts in non-salary recurrent expenditures and investments. The school infrastructure deteriorated and most schools lacked adequate furniture, textbooks and learning materials. Moreover, there were not enough schools and especially in the rural areas children had to walk long distances to the school. In urban areas, schools were overcrowded (IOB, 2000).

As a result, the literacy rate of the population deteriorated. In 2001, 75 percent of the children left primary school illiterate (World Bank 2001:70). Literacy rates for men aged 40-49 (approximately 90 percent) were considerably higher than the literacy rates of younger males (80-85 percent). Literacy rates for women were traditionally much lower (60-65 percent), but for women aged 15 to 24, they even dropped below 60 percent (CSO, 2003). Women have always had a disadvantaged position in primary education, but were gradually falling even further behind their male peer groups. The expansion of primary and secondary education slowed down, and even declined. In spite of the population growth (approximately 3.2 percent for the period 1990-2000), enrolment in primary education remained stable throughout the 1990s. By 1999, 37 percent of the children in the school-going age were not enrolled. In the rural areas, this percentage even amounted to more than 60 percent.

In 1999, net enrolment rates in Zambia (63 percent) were comparable with those in Kenya (64 percent) and much higher than those in Mozambique (52 percent) and Tanzania (48 percent) (UNESCO, 2007). Nevertheless, the education budget (2 percent of GDP) was low compared to other southern African countries (4-5 percent). As a result of long underinvestment in education, Zambian children scored relatively low on international tests. In 2000, pupils in Kenya, Mozambique, Tanzania and Uganda produced better results for reading and mathematics than pupils in Zambia (UNICEF, 2013). Only Malawian pupils showed lower figures.

Towards the end of the 1990s and at the turn of the century, however, the national economy began to pick up. This was assisted mainly by generally high copper prices in the world market. According to the World Bank (2012), total national income rose by more than 56 percent in the period 2002-2010 (based on 5.7 percent per annum real GDP growth for 2002-2010; and population growth averaging 2.8 percent per annum for the period 2000-2010). International Monetary Fund (IMF) data (October 2012) shows that per capita GDP increased from about USD 890 in 2006 to USD1, 221 in 2010. This value reached USD1,700 in 2014 and was estimated to reach about 1800 in 2015 save for the global macroeconomic shock that set in towards the end of 2014 (See Figure 2.1).

**Figure 2.1: Annual GDP Growth and Inflation, 2000-2014**

**Source**: World Bank Development Indicators (2015)

**Figure 2.2: GDP Per Capita (USD Current Prices), 2006- 2015**

**Source**: IMF (2015)

The growing economy, coupled with the implementation of ambitious education sector plans, (such as the BESSIP and MoESP[[3]](#footnote-3)) galvanised resource flows into the education sector, leading to improved education provisioning. Thus, “while in the 1990s, Zambia’s expenditure on education was low, ranging between 2 percent and 2.5 percent of GDP, the growing economy after the turn of the century enabled the Fifth National Development Plan (2006-2010) to recommend scaling up education spending from 3.6 percent of GDP in 2006 to 6.2 percent by 2010. While this target was not archived, the trend in education expenditure as a component of GDP assumed an upward trend, rising from 3.6 percent in 2006 to 4.37 percent in 2010, suggesting a strong association between economic factors and education provision in Zambia.

2.3 Social Factors

Social factors are another contextual reality that determine leaning outcomes in Zambia. These factors range from the poverty phenomena to cultural practices and gendered roles that altogether combine, leading to school achievement outcomes. Abject poverty remains the greatest challenge to Zambia’s socio-economic development. According to the 2010 Living Conditions Monitoring Survey (LCMS), around 60 percent of the population in Zambia could be considered poor, subdivided into extremely poor (42 percent) and moderately poor (18 percent). In absolute terms, 7.9 million people live in poverty, with 5.5 million of those living in extreme poverty with insufficient resources to meet their daily minimum food requirements. Although poverty has declined marginally when comparing 2006 and 2010 data (Figure 2.3), the absolute number of the poor has increased, from about 6 million in 1991 to 7.9 million in 2010 (UNICEF, 2014).

**Figure 2.3: Changes in Poverty Levels, 2006-2010 (%)**

**Source**: CSO (2012)

In general terms, (i) 84 percent of the poor population lives in rural areas; and (ii) 89 percent of the extremely poor are located in rural areas as well (Figure 2.4).

**Figure 2.4: Poverty Distribution Between Urban and Rural Areas in Zambia, 2010 (%)**

**Source**: Authors calculations, based on CSO (2012)

Poverty head count in urban areas dropped from 56 per cent in 1998 to 53 percent in 2004 and further to 29.7 percent in 2006 and 27.5 percent in 2010, rural poverty remained high, even though it marginally dropped from 83 percent in 1998 to 77.9 percent in 2010 (Figure 2.5 below).

**Figure 2.5: Poverty Trends in Zambia, 1998-2010, (% of Total Population)**

**Source**: CSO (2012).

The World Bank has calculated the dollar values for poverty in rural and urban Zambia (World Bank, 2012). In 2010, an extremely poor person in Zambia would live with the equivalent of USD 0.68 a day, or USD 20.52 a month. A poor person in a rural area would live with the equivalent of USD 1.01 daily (USD 30.43 monthly); in an urban area, the poor person would live with USD 1.25 daily, or USD 37.61 monthly. For poor households, however, intra-household allocation of scarce resources often imply a trade-off of education expenditure for matters of immediate family survival- mainly food security.

Of the total child population in Zambia, 4.6 million children and adolescents lived in poverty in 2010, representing 65 percent of that population. Around 46 percent of children and adolescents live in extreme poverty. The bottom line is clear - across all age groups, the proportion and absolute number of children of school going age (0-18 years old) living in poverty is much higher than for any other age group. Incidentally, child poverty is also predominantly rural: 85 percent of poor children live in rural areas (around 3.89 million children). In comparing the 0-18 age group with the whole population living in poverty, children represent 58 percent of the latter. In terms of extreme poverty, 59 percent of all people living in that condition in 2010 were children. UNICEF (2014) summarises the relationship between child poverty and education in Zambia as follows:

1. their parents have no or only primary education;
2. they live mainly in rural areas – although poverty has become evident in urban areas as well;
3. their household has no safe drinking water or proper sanitation, and no electricity;
4. they likely suffer from malnutrition;
5. they have limited access to quality and affordable education services,
6. They are more likely to enter school late, and, if they do, they are more likely to drop out before completing secondary education, and
7. If the poor child is a girl, there is a high chance she will have sexual intercourse with an older man when she reaches puberty:
   1. She might also get pregnant and drop out of school at around 14 or 15 years old.
   2. She may be given a chance to re-enter but the pressure to take care of her new born is too high. As such, poverty in Zambia is transmitted from generation to generation.

There is, therefore a clear relationship between poverty and school achievement in Zambia that urges for a more sustained and comprehensive policy response. Other socio-cultural factors that influence school achievement in Zambia include traditional view of gender roles, physical and psychological violence against the girl child, and early marriages (See UNICEF, 2014 for a detailed discussion of these factors). Altogether, these social factors combine leading to substantial influence on learner outcomes.

# 3.0: Understanding Gaps in the Situation of Education in Zambia[[4]](#footnote-4)

## 3.1 Policy Initiatives and Institutional Arrangements

### 3.1.1 Appraisal of Trends in Policy Initiatives and Priority Actions

In the second half of the 1990s, the Zambian government sought to revitalise the education sector after years of neglect. In 1996, following the 1990 Jomtien agenda[[5]](#footnote-5), the Government of the Republic of Zambia produced a policy document called Educating Our Future (1996), which marked the start of renewed attention to the education sector[[6]](#footnote-6). Building on this momentum and in support of the EFA goals, Zambia mobilized local and international assistance from cooperating partners and civil society actors operating in the education sector. In order to reduce transaction costs, Zambia also developed a Joint Assistance Strategy (JAS) that harmonizes general education investments, aid coordination and monitoring of progress. Critical investment frameworks for education included the Basic Education Subsector Investment Programme (BESSIP - 1999), the Education Sector Plan (2003 - 2007), the Fifth National Development Plan, Education Chapter (2006), the Second and Third Education National Implementation Plan (NIF II 2008 & III- 2012), the Sixth National Development Plan ( 2011-2015). For the purpose of this report, two of these critical investment frameworks that have been hailed as having made significant impact are reviewed, namely the Basic Education Sub-Sector Investment Plan (BESSIP, 1999-2002) and the Ministry of Education Strategic Plan (MoESP, 2003-2007).

Together with the abolition of school fees, the implementation of these plans resulted in a sharp increase in the number of children enrolling. Each is reviewed in the next few paragraphs to demonstrate how they influenced the achievement of EFA/MDG education goals.

1. **Basic Education Sub-Sector Investment Programme (BESSIP)**

With heightened political will and resource availability from the World Bank, the Basic Education Sub-Sector Investment Programme (BESSIP) was a targeted education investment plan which sought to increase access and quality of primary education. Its main objectives were to: a) increase enrolment at grades 1-7 and reverse the decline in enrolment by providing access to education for all eligible children; b) improve learning achievements, especially in literacy and mathematics (BESSIP, 1999). By implementing this plan, the Ministry of Education (MoE) sought to realise 100 percent enrolment by 2005 while at the same time reducing repetition and dropout rates. Second, by that time at least 65 percent of the pupils were to reach satisfactory levels for English and at least 50 percent of the pupils were to achieve satisfactory results for mathematics. By 2015, every pupil was to be given the opportunity to proceed to the higher basic level (grade 8). By 2005, 60 percent of schools were to meet the minimum education standards and the average pupil teacher ratio was to be 40:1 (IOB Evaluation Report, 2008:36). More specifically, BESSIP sought to improve access to education through:

• Constructing new schools in order to reduce walking distances to a maximum of five kilometres;

• Reducing school costs for parents by providing grants to schools;

• Enrolling children who had dropped out or had never gone to school;

• Offering more bursaries to vulnerable children (girls, orphans, the poor and children in rural areas).

At the same time, the quality of education was to be improved through:

• Providing textbooks (by 2005, no more than two pupils were to share one book for English, Mathematics or Zambian languages);

• More focused and decentralised training;

• Implementing a national assessment of the education system;

• Revising the basic school curriculum;

• Teaching initial literacy through familiar languages.

Chisala and Cornelissen (2003:86) report that “BESSIP had a slow start”. In 1999, only 19 percent of the pooled funds were actually spent. They attribute this to the slow restructuring process at the Ministry of Education and the slow pace of decentralisation that hindered effective implementation of BESSIP at the local level (Chisala and Cornelissen, 2003:86). The programme was more successful in its second phase, however. In February 2002, President Levy Mwanawasa announced Free Basic Education (FBE) for grades 1-7. Statutory fees for these grades were abolished in order to improve enrolment and retention, especially of vulnerable children. Moreover, school uniforms were no longer compulsory. Free Basic Education was implemented immediately (IOB, Evaluation Report, 2008:38).

A 2008 study on the Impact of primary education in Zambia found that “in 2000, there were approximately 5,300 basic schools ( Grades 1-9) in Zambia, this number had increased to more than 8,000 in 2006 (with the largest growth coming from community schools)”. Over the same period, the total number of classrooms increased from 25,000 to 35,000. Further, under BESSIP, the MoE distributed 1.4 million books. Large numbers of new teachers were also recruited and trained. The total number of teachers increased by 35 percent, from 37,000 in 2000 to 57,000 in 2007 (including 44,000 teachers in GRZ schools and grant-aided schools, 4,000 in private/church schools and 8,500 in community schools). Completion rates improved from 67 percent to 82 percent in 2005. Although the gender gap decreased and parity was achieved at primary school level, gender disparities remained at secondary school levels (ZANEC, 2014).

BESSIP had some inherent gaps in design and implementation, however. First, it placed more emphasis on access than quality. Second, the rapid increase in enrolments outstripped teacher recruitment, leading to overcrowding in schools. Third, learning and teaching materials were also outstripped by the rapid increase in enrolment. Fourth, it ran parallel to the public service education system and thus, did not strengthen the education system in Zambia. As Irish Aid wrote, “this is clear when you assess the output from the high schools [grades 10-12] against that of the basic schools [grades 1-9]. High schools [grades 10-12] are in a deplorable state due to nearly 10 years of primary focus on the basic [grades 1-9] sub-sector” (comments by Irish Aid on BESSIP, January 2007 cited in World Bank 2007:37).

Most fundamentally, the major shortcoming was its narrow focus and preoccupation with inputs and enrolments, leaving a gap in actual learning outcomes. However, it is credited for managing to lift primary enrolment by over half from 1.9 million in 2002/2003 to 3.2 million in 2004/5, thus accelerating the country’s progress towards achieving universal primary education by 2015 (ECA/UNDP Report, 2012:27). BESSIP came to an end in 2002.

1. **Ministry of Education Strategic Plan (MoESP 2003-2007)**

In February 2003, the MoE launched a five-year Ministry of Education Strategic Plan (MoESP 2003-2007) as a follow-up to BESSIP. The Strategic Plan recognised the need for further investment in the education sector. At that time, Zambia did not spend heavily on education compared to surrounding countries (MoE, 2003:18). The Sector Strategic Plan expanded the focus from basic education to the whole sector, including basic school, high school and tertiary education. Whereas the emphasis of BESSIP had been on enrolment at grades 1-7, the MoESP stressed the need to also expand enrolment in grades 8 and 9 (the higher basic education level). In addition, remote and disadvantaged areas would be given special attention. These would be targeted for additional resource allocation, teacher deployment and construction or rehabilitation of infrastructure (MoE, 2003:19).

For basic education (Grades 1-9), the strategic plan set the objective of increasing the grade 7 completion rate to 85 percent by 2007. Total enrolment in the lower and middle basic levels (Grades 1-7) was to improve from 1.9 million in 2002 to 2.3 million in 2007. Upper basic (Grades 8-9) enrolment was to increase by almost 50 percent (from 219,000 in 2002 to 326,000 in 2007). The MoESP intended to improve the quality of education as well. According to the strategic plan, the quality of education had been compromised by an overloaded and compartmentalised curriculum, dismal pupil teacher contact time and a lack of educational materials (MoESP 2003:23). There was a shortfall of 400,000 school places (8,500 classrooms) and a backlog of 6,000 teachers’ houses. Moreover, 60 percent of the classrooms and 70 percent of the teachers’ houses needed to be rehabilitated.

The Sector Plan sought to increase the number of teachers (especially female teachers) in rural areas by increasing incentives in terms of promotion, upgrading opportunities and hardship allowances. It was anticipated that by 2005, 39,000 teachers would be needed at the middle basic (Grades 5-7) level (including 6,400 private school teachers) and (an additional) 9,400 teachers at the upper basic ( Grades 8-9) level (including 2,100 private teachers). The (continued) use of ‘double shifting’, with more than 43 percent of the teachers taking double shifts, was regarded a necessary evil in the efficient utilisation of classrooms.

The plan anticipated an increase in expenditure for (middle) basic education (Grades 5-7) from ZMW 215 million in 2001 (USD 77 million) to ZMW 496 million (USD 179 million) in 2006 – an increase of 131 percent (constant prices 2001). The budget share allocated to (middle) basic education (Grades 5-7) was to increase from 44 percent in 2001 to 53 percent in 2006. While no systematic evaluation has been done about MoESP, the evidence points to consolidation of achievements recorded during BESSIP. MOESP is credited for ensuring a more-coordinated approach to external sector support[[7]](#footnote-7) (IOB, Evaluation Report, 2008). However, gaps noticed in respect of BESSIP’s preoccupation with inputs and enrolments and not actual learning outcomes persisted under MoESP. Access improved but quality and actual learning outcomes showed no significant improvement.

### 3.1.2 Appraisal of Trends in Institutional Arrangements

A feature of the 1996 Educating Our Future Policy was the introduction of a decentralised approach to educational delivery in Zambia. This culminated into the creation of over 100 education management boards. District Education Boards are responsible for (basic, Grades 1-9) education in a particular district and for the allocation of education facilities, including the staffing of schools. Members of the Board are appointed by the District Education Boards Secretariat (DEBS). The District Education Standards Office (DESO) is responsible for monitoring and evaluating school performance. The Provincial Education Office (PEO) is responsible for the high schools (Grades 10-12) and for the coordination and implementation of district programmes and the monitoring and supervision of policy standards. Public funding flows to schools through Education Boards for high schools (Grades 10-12) and through the DEBS for basic schools (Grades 1-9). Parent Teacher Associations (PTAs), introduced in the mid-1990s, act as a liaison between parents, teachers, and the school administration. They are often responsible for fundraising, formulating priorities and the allocation of funds.

Another integral aspect of the institutional arrangement that was meant to facilitate the achievement of universal primary education in Zambia was the role of civil society. An important step in this respect was the creation of the education umbrella civil society organisation, Zambia National Education Coalition (ZANEC) in 2001. ZANEC provides a framework for coordinating all civil society non-governmental organisations in education. This includes community and faith based organisations that supplement government efforts in the provision of education. ZANEC makes its contribution through advocacy, research and capacity building of its member organisations.

## 3.2 Trends and Patterns Towards Full Enrolment and Retention

### 3.2.1 Early Childhood Care Development and Education, ECCDE

The first EFA goal aims at expanding and improving comprehensive early childhood care and education, especially for the most vulnerable and disadvantaged children[[8]](#footnote-8). However, there is scanty information in terms of day care services or crèches for children up to three years old in Zambia. Despite the fact that ECCDE is considered part of the formal education system in Zambia, the school census by the Ministry of Education does not collect data on preschool institutions and/or students aged 36-59 months. The reasons may be historical since ECCDE has not been a major responsibility of government. This has been the case for both pre - and post-independence governments but this needs to change if the quality of learning is to improve in future.

In colonial times, Sub O education was offered for one year and included learning to write letters of the alphabet, on the ground, for African children. This was the closest the system then came to offering ECCDE. Later, the colonial government came up with Day Nursery Act of 1957 to benefit local children. After independence, the government established nurseries and pre-schools through the Ministry of Local Government and Housing. These were mainly located in welfare halls. The level of participation though remained low and by the middle 1980s this provision had fizzled off. Since then, ECCDE has been more of a private sector initiative concentrated in urban areas.

The bottom line is clear- there is a gap in official responsibility for financing ECCDE in the country. Despite inclusion of the ECCDE sub-sector as a priority in national development and education sector plans, financing is almost negligible, especially considering rising demands. Over the period 2012- 2014, ECCDE received annually around 0.1 percent of the total education budget compared with 63 percent received by the basic education (Grades 1-9) sub-sector (UNICEF, 2014:131). The trend is also reflected in the National Implementation Framework (NIF) III 2011-2015 projections[[9]](#footnote-9), that set aside to ECCDE only an average of 0.1 percent annually. Unfortunately, the lack of ECCDE services increases the risk of children entering school unprepared which subsequently affects their future learning. Figure 3.1 provides current trends in grade 1 entrants with pre-school experience at the national level for the period 2004 to 2014.

**Figure 3.1: Trends in Grade One Entrants with Pre-school Experience, 2004-2014**

**Source**: Education Statistical Bulletins, MOE.

As seen from Figure 3.1, in 2004 which marks the commencement of EFA goals, 15.9 percent of the students in Grade 1 came from preschool facilities. This rose marginally to 17 percent in 2010 and further to 18.7 in 2013 before declining to 15.4 percent in 2014. The EFA target was to reach 50 percent in 2015. This was not met. A huge gap to the EFA target, therefore exits. This is confirmed by the UNICEF Zambia (2013) study which points out that only a minority of pre-primary age children are attending preschool.

UNICEF Zambia (2014) reports that the causes of low enrolment in ECCDE are connected mainly to the supplyand demand of services in the country. There is no adequate supply in Zambia. The fact that many children younger than seven years old are attending Grade 1 is one indication that the supply of preschools for children three to six years old is not enough. Besides, the country has insufficient human resources and capacity to effectively coordinate early childhood programmes. There are few ECCDE teacher training colleges and employment opportunities are poor, leading to a lack of attraction for this area of work (UNICEF Zambia, 2012). Indeed, while the percent of trained teachers in education was one of the indicators to monitor progress of the ECCDE goal, it is unclear to what extent this was achieved. Preliminary data suggests a commitment was made by the government to deploy 1,000 ECCDE teachers per year between 2014 and 2020. However, given that National ECCDE curriculum frameworks and policies are in draft form, it may not be until much later that this is realised. Incidentally, ECCDE is not yet seen as a priority by many cooperating partners and therefore attracts limited resources.

In terms of contextualfactors, UNICEF (2014) notes that ECCDE as a programme does not belong to any specific ministry; it is a challenge to coordinate with relevant line ministries. Less than 0.1 percent of the budget for education was available for ECCDE services in 2009, 2010 and 2011 (UNICEF, 2014). There is also a general lack of infrastructure, curricula and materials for a holistic initiative. On the demand and personal factorside, the concept of ECCDE centres is still relatively new in Zambia, and parents might not understand the importance of sending their children to such centres in their early years. Within a society where girls at a young age often take care of younger siblings, proving this is not the best practice might take time. Hence, lack of knowledge among families of the benefits of ECCDE centres means the necessary public demand to enforce the creation of such centres by the Government is not generated. As such, government has the luxury of taking a ‘laid back’ approach. Advocating for priority policy attention and an institutional framework for coordinating efforts aimed at improving ECCDE in Zambia becomes of essence for realising the 2030 agenda. Civil society needs to act on present possibilities to mobilise masses and generate the requisite public demand for establishment of ECCDE centres and increase financial allocation to the sub-sector.

### 3.2.2 Achieving Universal Primary Education

The second EFA goal was aimed at ensuring that by 2015 all children, particularly girls, children in difficult circumstances and those belonging to ethnic minorities, have access to and complete, free and compulsory primary education of good quality. This goal was complemented by MDG2 and is discussed here using the country indicators on net enrolment in primary school and primary completion rate.

1. **Net Enrolment in Primary Education**

In regard to the Net Enrollment Rate (NER), Zambia has made steady progress. The NER increased from 80 per cent in 1990 to 94.3 per cent in 2014[[10]](#footnote-10). Notwithstanding, the 2015 target of 100 percent net enrolment in primary education for both girls and boys will be narrowly missed (See Figure 3.2).

**Figure 3.2: Primary School Net Enrolment Rate by Sex, 1990 - 2014**

**Source**: MOE, Annual Education Statistics Bulletins

Access to primary schooling has increased and the gap between boys and girls enrolled in primary schools progressively narrowed. The absolute number of students in primary education has more than doubled in the EFA reference period (2000-2015), increasing from 1.6 million in 2000 to 3.7 million in 2014 (Ministry of Education, 2014). In gender terms, there were 1,613,748 boys enrolled in primary school in Zambia in 2014, representing 50.1 percent compared to 1,604,124 girls enrolled in the same year, representing 49.9 percent (MoE, 2014). Gender disparities at this level have, therefore, almost been eliminated. Besides, the 2014 School Census, records that out of 9,548 schools in the country, 8754 (i.e., 92 percent) offered classes in grades 1-7. Over the period 2005 to 2014, the annual growth rate of primary schools was 1.4 percent. This was less than the population growth rate for the period 1990-2010 of about 2.8 percent and even less than the projected population growth rate of 3.2 percent for the period 2010 to 2020. Therefore, the rate at which school places have been growing in the country is less than the rate of growth of the population, particularly of school going children. Consequently, primary school classes are generally overcrowded and have higher pupil-teacher ratios thereby compromising the quality of education. Thus, while supply of primary school places increased, the demand of primary school education outstripped that of supply, and this is fairly consistent with the inadequate school infrastructure and materials for a sustained quality inclusive education in Zambia.

**Table 3.2: Net Enrolment Ratio (Grades 1-7) by Province, 2004-2014**

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
|  | 2004 | 2010 | 2012 | 2013 | 2014 | Percentage point  gains/loss  2004-2014 | Percentage  point  Gap to 100 %  target |
| National | 85.1 | 93.7 | 109.9 | 107.0 | 94.3 | 9.2 | 5.7 |
| Central | 89.4 | 92.0 | 132.1 | 122.6 | 118.6 | 29.6 | Target Met | |
| Copperbelt | 98 | 95.7 | 114.5 | 98.3 | 88.1 | -9.9 | 11.9 |
| Eastern | 65.3 |  | 89.8 | 90.5 | 87.4 | 22.1 | 12.6 |
| Luapula | 76.4 | 95.5 | 109.6 | 108.0 | 104.5 | 28.1 | Target met |
| Lusaka | 75.6 | 94.6 | 102.3 | 96.9 | 71 | -4.6 | 29 |
| North-Western | 85.5 | 94.6 | 109.3 | 113.4 | 111.9 | 26.4 | Target met |
| Northern | 96.2 | 93.2 | 112.1 | 112.1 | 96.0 | -0.2 | 2 |
| Southern | 92.0 | 93.5 | 111.0 | 111.1 | 95.4 | 3.4 | 4.6 |
| Western | 85.9 | 94.8 | 115.2 | 118.5 | 100.3 | 14.4 | Target Met |

**Source:** MOE Annual Statistical Bulletins (2004-2014)

At the provincial level, the picture of progress during the reference period was mixed (Figure 3.2 above). Four provinces made considerable strides to improve their primary school net enrolments rates by more than 20 percentage points (Table 3.2). These are Central, Eastern, Luapula and North-Western. Two provinces, Southern and Western, registered increases in primary school enrolment ratios of 1-20 percentage points in the last decade. However, a few provinces suffered notable reversals in net enrolment in primary education over the same period, including Copper belt, Lusaka and Northern Provinces (see Table 3.3). This raises concerns about the pattern of access to education provision in the country.

**Table 3.3 Net Enrolment Changes in Primary Education by Province, 2004-2014**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Gains of 20  Percentage Points or More | | Gains of 1-20  Percentage Points | | Declines | |
| Province | Percentage gains | Province | Percentage gains | Province | Percentage gains |
| Central Province | 29.6 | **Southern Province** | 3.4 | **Copperbelt** | -9.9 |
| Eastern Province | 22.1 | **Western Province** | 14.4 | **Lusaka** | -4.6 |
| Luapula Province | 28.1 |  |  | **Northern** | -0.2 |
| North-Western | 26.4 |  |  |  |  |

**Source:**  MoE, Education Statistical Bulletins.

On aggregate, four provinces have already met and exceeded the 2015 MDG target of 100 NER as at 2014: Central, Luapula, North-Western and Western Province (Figure 3.2). Northern and Southern Province are off track by less than 5 percentage point as at 2014 but remain on track to meet the 100 percent target by 2015. Three provinces are more than 10 percentage points away from hitting the target by 2015. Among these, Lusaka shows the largest deviation from the target, with a net primary enrolment ratio 29 percentage points off target in 2014. The other two provinces are Eastern province (12.6 percentage points off target) and Copper belt province (11.9 percentage points off target). These provinces need to undertake a diagnostic approach to address their binding constraints as they are unlikely to meet the 2015 MDG target.

More fundamentally, the issue of inequality, which the EFA/MDGs frameworks failed to address properly, is at the heart of ambivalent performance across the different provinces in Zambia. This should be considered more seriously in future. Comparing the achievement trends across provinces, the wide disparity undermines the positive image of the national achievement in net enrollment and primary school completion. But it also underscores the reality that focusing merely on national progress can easily hide slower progress and growing disparities among a specific region and or group of the population. The national picture, for instance, fails to account for access to primary education among some vulnerable child populations such as the disabled. Civil society advocacy messages for the post 2015 education agenda could therefore center on the need to address provincial inequalities in access and quality of education in Zambia. One way is to introduce appropriate regional inequality indicators and to have them reported regularly. The other is to monitor the indicators for different groups of the population.

**2.0 Primary Education Completion Rate[[11]](#footnote-11)**

The proportion of pupils reaching grade 7 has increased from 64 percent in 1990 to 86.2 percent in 2014, representing a 22.2 percentage point gain over the 24 year period from 1990 to 2014 (See Figure 3.2). This is largely due to the Free Primary Education (FPE) policy (2002); launching of an integrated multifaceted basic education investment programme; implementation of the re-entry policy for girls and vulnerable children; and the abolition of the Grade 7 examination fee (Beyani, 2013). The steep gains between 2000 and 2007 can be linked to the influence of BESSIP (1999-2002) and the MoESP(2003-2007). In trying to boost attendance among vulnerable groups, the government also implemented a school feeding programme in collaboration with the World Food Programme (WFP). More pupils that complete the primary level have transitioned to secondary education over the past decade. Zambia has specifically encouraged more girls to progress to grade 8 on account of available school places. This has been in line with the 2008 United Nations Girls’ Education Initiative (UNGEI).

**Figure 3.2: Progress in Grade 7 Completion, 1990-2014**

**Source**: MDG Porogress Report (2013); MOE (2014).

The rising trend in overall primary completion rates notwithstanding, the efficiency of the education system is still quite low. The primary school system still has significant numbers of over-aged pupils because of late entrants and grade repetition. The Ministry of Education notes the challenge faced in keeping children in school. For instance, the survival rate to grade 5 has fluctuated between 70 and 95 percent over the last eight years ( 2007-2014) but with an overall rising trend even though it has recently declined from a high of 95 percent recorded in 2012 to 70.7 percent in 2014(Figure 3-3).

Nonetheless, this rate is still amongst the lowest in the region. Examining transition rates by grade shows the retention and, conversely, the magnitude of loss through dropout or repetition at each level (Figure 3-4). Therefore, retention remains a problem, especially as students’ progress into higher grades. The 2014 School Census, for instance, indicates that while NER in primary was 94.3 percent, that of secondary school was only 27.9 percent.

**Figure 3.3: Survival Rate (%) to Grade 5 by Sex from 2007 to 2014**

**Source:** MoE(2014:59)

**Figure 3.4: Transition Rates in Grades 1- 7, 2012 – 2013 (Percent)**

**Source**: Ministry of Education (2014:33)

Evident from the graph is that the greatest proportion of children is not retained in the transition from grade 6 to grade 7. Some 20 per cent of children who attended grade 6 are not in grade 7 in the following year, because of dropout or repetition. This means that a significant proportion of the pupils who reached grade 6 of primary in 2012 did not graduate from that grade in 2013. The rea­sons may include a poor quality of education, the low capacity of schools to retain children, as well as pover­ty and other factors external to the education sector. Sabates et al (2010) classifies them into three groups: individual factors such as poor health or malnutrition of pupils; household situation (including child work and poverty); and school factors such as school location and poor education provision. Addressing the dropout rate within and between the primary and secondary schools, especially for marginalized children from rural and poor households must become a major advocacy point for non-state actors. Every child’s right to quality education must be guaranteed in irrespective of their location, family background and economic status.

Sub-national trends for primary completion rate for the ten-year period from 2004 to 2014 are illustrated in Table 3.5. In this period, the aggregate primary completion rate for Zambia rose by 14.2 percentage points, rising from 72 percent in 2004 to 86.2 percent in 2014. Of the nine provinces with data for 2014, four had completion rates of 90 percent and above in 2014. These are Central (103.1 percent), Copperbelt (91.5 percent) North-Western (99 percent), and Southern province (91.1). Only Central province, however has already met and exceeded the 100 percent MDG target for primary completion rate as at 2014.

**Table 3.5: Changes in Completion Rate (%) for Grade 7 by Sex and Province, 2004-2014**

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
|  | 2004 | | | 2014 | | | Total  percentage gains/loss  2004-2014 | Total  percentage  point gap to MDG target of 100 |
|  | **Male** | **Female** | **Total** | **Male** | **Female** | **Total** |  |  |
| National | 78.3 | 65.8 | 72.0 | 88.9 | 83.6 | 86.2 | 14.2 | 13.8 |
| Central | 85.2 | 76 | 80.6 | 105.0 | 101.3 | 103.1 | 22.5 | 0 |
| Copperbelt | 92.1 | 85.3 | 88.6 | 91.6 | 91.4 | 91.5 | 2.9 | 8.5 |
| Eastern | 56.2 | 42.4 | 49.3 | 72.8 | 66.5 | 69.7 | 20.4 | 30.3 |
| Luapula | 62.8 | 43.3 | 53.1 | 91.8 | 78.7 | 85.3 | 32.2 | 14.7 |
| Lusaka | 84.1 | 82.1 | 83.1 | 86.8 | 84.4 | 85.5 | 2.4 | 14.5 |
| North-Western | 74.9 | 55.9 | 65.4 | 102.2 | 95.7 | 99.0 | 33.6 | 1 |
| Northern | 83.9 | 56.4 | 70.2 | 80.3 | 62.7 | 71.6 | 1.4 | 28.4 |
| Southern | 86.9 | 75.1 | 80.9 | 91.4 | 90.8 | 91.1 | 10.2 | 8.9 |
| Western | 66.7 | 54.7 | 60.7 | 84.5 | 81.0 | 82.8 | 22.1 | 17.2 |

**Source:** MOE, Educational Statistics Bulletins.

On further investigation of data sets in Table 3.5, its becomes noticeable that the probability of boys and girls not completing primary school remains high in the country- about 12 percent for boys and 17 percent for girls. Overall, only 55 percent of students who make it to the end of primary school continue into lower secondary school (Grade 8). This presents a major challenge in terms of providing complete basic education (Grades 1-9) to the children of Zambia (UNICEF, 2013).

Often neglected, also, is the phenomenon of out-of-school-children in Zambia. School census data for 2014 shows that Zambia has 4.01 million students up to 18 years old enrolled in school from Grades 1 to 12. This number may actually be bigger since data from the Ministry of Education do not consider those over 18 years and still enrolled at school[[12]](#footnote-12).

Therefore, despite progress over the last past years, the right to education is still far from being fully realised in the country. Official country data shows a big number of out-of-school children who could be categorized into three complementary groups: (i) those who have never attended school; (ii) those who have entered school late (but at the time of the 2010 Census data collection were not yet enrolled); and (iii) those who at some point in time were at school, but for many different reasons, are not enrolled anymore- dropouts. Data from the 2010 Census shows 17 percent of the population between seven and eighteen years (considered the school-age population) have never attended school. In absolute numbers, UNICEF (2014:134) reports that more than 630,000 children aged seven to eighteen have never had access to education in Zambia. As with other basic rights, rural areas are the most vulnerable and affected – 22 percent of children of school age in rural areas have never attended school

### 3.2.3 Equitable Access to Appropriate Learning and Life Skills of all Young People

Zambia’s youth literacy rates have generally risen above 85 percent in the period 1990 to 2014 (Figure 3.5).

**Figure 3.5: Progress in Youth literacy, 1990-2010**

**Source**: MDG Progress Report (2013).

At national level, youth literacy was 88.7 percent in 2010. This was an increase from 70.1 percent in 2000. Between 2000 and 2010 the male and female literacy rate increased by 15.8 percentage points for males and 21.0 percentage points for females. The youth literacy rate for both rural and urban areas increased between 2000 and 2010. It increased from 59.5 percent in 2000 to 82.5 percent in 2010 for rural areas and from 86.5 percent in 2000 to 96.5 percent for urban areas (CSO, 2012:25).

Despite the rising trend, progress towards the EFA/ MDG target appears slow. An equal concern is the gender inequity in literacy rates, as girls still lag behind (Figure 3.5). As seen in Figure 3.5, the pattern for youth literacy between the sexes remains the same, with males surpassing those of females in all the years for which data was available. This pattern may reflect the need for policies to improve youth literacy rates among women particularly. Overall, available data points to an existing skills gap that requires redressing beyond 2015

Sub-national trends in youth literacy rates for the twenty-year period from 1990 to 2014 are illustrated in Table 3.6. In this period, the aggregate youth literacy rate for Zambia rose by 11.3 percentage points, rising from 74.9 percent in 1990 to 88.7 percent in 2014. Three provinces had youth literacy rates of 90 percent and above in 2010. These are Copperbelt (96.6 percent) Lusaka (96.1), and Southern province (91.3). These are all predominantly urban provinces. Youth literacy gap is therefore largest between young people who live in urban areas and those in rural areas (the rates being respectively 96.6 percent and 82.3 percent).

**Table 3.6: Changes in Literacy Rates (%) by Province, 1990-2010**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | 1990 | 2010 | Total  percentage gains/loss  1990-2010 | Total  percentage  point gap to MDG target of 100 |
| Central | 74.8 | 89.7 | 14.9 | 10.3 |
| Copperbelt | 88.2 | 96.6 | 8.4 | 3.4 |
| Eastern | 54.2 | 75.2 | 21 | 24.8 |
| Luapula | 69.5 | 83.8 | 14.3 | 16.2 |
| Lusaka | 85.5 | 96.1 | 10.6 | 3.9 |
| North-Western | 64.5 | 86.8 | 22.3 | 13.2 |
| Northern | 68 | 82.2 | 14.2 | 17.8 |
| Southern | 77.1 | 91.3 | 14.2 | 8.7 |
| Western | 70.4 | 82 | 11.6 | 18 |
| National | 74.9 | 88.7 | 13.8 | 11.3 |

**Source: CSO, National Reports.**

In 2010, Copper belt province had the highest youth literacy rate (96.6 percent) while Eastern province had the lowest (75.2 percent). Over the period 1990 and 2010, five provinces have made considerable strides to improve their youth literacy rates by more than 20 percentage points (Table 3.6). These are Eastern and North-Western. Incidentally, Eastern and North-Western provinces also made considerable strides in improving net enrolment rates for primary school and completion rates in the last decade. The general pattern that emerges is that provinces that have demonstrated strong improvement in both net enrolment rates in primary school and primary completion rates have also reflected strong performance in youth literacy. Provinces that recorded healthy gains of between 10-20 percentage points include Central, Luapula, Lusaka, Northern, Southern and Western Provinces. The Copper belt province saw only marginal gains of 8.4 percentage points over the reference period but the province was already with a comparatively higher starting point of 88.2 percent in 1990.

In terms of the gap left to the achieve the 2015 MDG target of 100 percent youth literacy rates, the pattern that emerges is that urban provinces were close to hitting the target in 2010 and remain on course. As at 2010, Copper belt and Lusaka provinces were within 4 percentage points to hitting the target. Provinces that are predominantly rural (Eastern, Luapula, Northern and Western) were off track in 2010 by between 16-25 percentages points. Among these, Eastern Province shows the largest deviations from the target, with youth literacy rates of about 25 percentage points off target in 2010.

The inauspicious performance on youth literacy points to concerns about the nature of skills development in the country. The education doctrine and training system at all levels are not producing the quality of skills required by the labour market. At best there is a skill-mismatch. Going forward, efforts to increase the supply of relevant skills and training have to be seen in the context of strengthening secondary and post-secondary vocational studies to make the education system more flexible and responsive to the emerging needs of the economy.

### 3.2.4 Achieving 50 Percent Improvement in Adult Literacy by 2015

The fourth EFA aimed to achieve a 50 per cent improvement in levels of adult literacy by 2015, especially for women, and equitable access to basic and continuing education for all adults. The fundamental thrust for adult literacy is that literate individuals are better “able to access other education and employment opportunities and collectively, literate societies are better geared to meet development challenges” (Car-Hill, Frostell and Pesoa, 2008).

The EFA target of halving adult illiteracy rates by 50 percent, especially for women implied that the national average literacy rate that stood at 67.2 was targeted to be raised to 83.6 by 2015. The Government of the republic of Zambia admits that “efforts to ensure that the manifest gender gap in adult illiteracy was reduced through mandate to provide, coordinate, manage and monitor adult remains a huge challenge”(MoE, 2015). At best, it is envisaged that the policies on Free Education and Re-entry for girls will have a significant impact in the elimination of gender disparities in literacy levels in the adult population. Overall, adult literacy and continued education – along early childhood education remains neglected sub-sectors in Zambia, at best only addressed with half-hearted attempts at the official level.

### 3.2.5 Gender Disparity in Primary and Secondary Schools

The ratio of girls to boys in primary education has increased from 0.90 in 1990 to 0.99 in 2010, which is very close to the target of 1. In effect, Zambia has attained gender parity in primary school enrolment. The Programme for Advancement of Girls’ Education, introduced in 1994, and to a lesser degree the re-entry policy, is considered a major driver in this regard. Gender parity by province shows that Lusaka and Copperbelt Provinces have attained equality in primary education. Being urban provinces, they have a high number of school places, and are less susceptible to traditions working against girls getting an education. Amongst the rural provinces, Eastern (0.99) had the best gender parity, while Northern (0.93) had the worst.

Gender parity in secondary education has, however, fallen from 0.92 in 1990 to 0.86 in 2010 (see Table 3.7), primarily driven by a high dropout rate for girls. Girls are being socialized to become wives, mothers and care-givers, which results in more domestic responsibilities (chores and care tasks), teenage pregnancies and early marriages. Once in secondary school, girls are also vulnerable to sexual harassment and violence and related diseases such as HIV and AIDS.

**Table 3.7: Gender Parity Ratios – Primary and Secondary Level 2006 – 2013**

|  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Level | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | Target 2015 |
| Primary | 0.96 | 0.96 | 0.96 | 1.00 | 0.99 | 0.97 | 0.99 | 0.99 | 1 |
| Secondary | 0.80 | 0.83 | 0.82 | 0.93 | 0.86 | 0.82 | 0.80 | 0.84 | 1 |
|  |  |  |  |  |  |  |  |  |  |

**Source:** Ministry of Education (2014).

**Figure 3.6: Gender Parity Ratios – Primary and Secondary Level 2006 – 2013**

**Source:** Ministry of Education (2014).

Gender parity in tertiary education has remained almost unchanged from 2005 (0.74 percent) to 2009 (0.75 percent). Many young women do not enrol in colleges and university, or find it difficult to continue attending classes after getting married or becoming pregnant. However, within some tertiary institutions, such as the University of Zambia, great improvements have been made. The obvious exception is the Copperbelt University, which had a ratio of females to males of 0.39 in 2011. This is likely to be caused by this institution offering primarily scientific and mathematical courses.

### 3.2.6 Quality of Education

The sixth EFA goal was about improving all aspects of the quality of education and ensuring excellence of all so that recognized and measurable learning outcomes are achieved by all, especially in literacy, numeracy and essential life skills. Zambia concedes that although significant progress has been registered in the expansion of primary and secondary enrolment rates and gender equality at primary school level, the quality of education has suffered. Incidentally, despite Zambia’s success in expanding access to education, the country has routinely ranked at the bottom in terms of academic achievement as measured by standardised national and regional testing. As the 2012 Grade Five National Assessment (G5NA) indicates, pupils consistently score below the 40th percentile, the minimum performance standard established by the Ministry of Education. Mean scores in 2012 recorded include 35.3 per cent in reading in English; 39.4 per cent in mathematics; 40.2 per cent in life skills; and 39.4 per cent in Zambian languages.

This pattern of results has persisted over the past decade. Regionally, the Southern and Eastern Africa Consortium for Monitoring Educational Quality (SACMEQ) shows that Zambian learners are performing at levels far lower than their regional counterparts. In 2007, for example, Zambia’s learners scored an average of 434 in reading and 435 in mathematics on the SACMEQ assessment, well below the international mean of 500.

## 3.3 Main Education Gaps: A Summation

The following key education gaps stand out from the discussion:

* **ECCDE Gap**

Early childhood care and development education remains a glaring gap in the Zambian education system. Demand exists but supply at the official government level remains negligible. This continues to pose a major challenge to learning outcomes and the future of the national economy. Thus, access to ECCDE continues to be hampered by the inadequacy of ECCDE services in the country.

* **The Sustainability of the Free Primary Education Policy**

The sustainability of free primary education remains questionable. Schools are still faced with many costs, such as for purchasing learning materials and maintenance. In urban areas, schools confront additional expenses for water and electricity. Further, education grants have decreased over time and become more erratic as the number of schools increase.

* **Post-basic Education Gap**

The strong emphasis on basic education since 1996 has meant that post-basic education has not received the attention required in terms of expansion, rehabilitation, educational material support or curriculum review. The share of public expenditures allocated to post basic education fell significantly during the late 1990s, forcing high schools to become increasingly financially autonomous. Much higher fees were imposed, restricting access to high schools for the large majority of households. This has serious implications for the country’s service delivery capacity and consequently sustainable human development.

* **Quality of Education Services gap**

Though substantial efforts have been made to deliver the required inputs for a well-functioning school system, interventions have been insufficient to enable the quality of services to keep up with the growth in enrolment. Some of the measures implemented included increasing the supply of qualified and motivated teachers, changing the curriculum to provide necessary skills and knowledge, creating effective administration, optimizing instructional time, and increasing the supply of teaching and learning materials. The school system failed to motivate both service providers and clients, however, and provide them with the means to hold the school system accountable. The quality of learning has been compromised.

* **Learning Achievements Gap**

Successive surveys reveal low achievements in pupil performance in reading in English and mathematics. The findings also indicate that few pupils have attained full mastery of skills at the grade five level. This has led the Government to change the language policy, so the language of instruction in grades one and two is the familiar Zambian language of a given area, while the pupils learn English as a second language. The language of instruction from grade three onwards is English, which continues to be taught alongside Zambian languages. Among the factors that explain weak learning achievement is underinvestment over a number of years in the instructional dimension of education.

* **Skills Gaps**

There has been a mismatch between the expansion of basic education, development of skills and the demand for labour in the economy. Low quality education achievements at a basic level produce a labour force difficult to employ, educate and train further. Other issues of concern are the brain drain, the inability of available skills to influence growth and poverty reduction in Zambia, and the slow pace of increase in essential skills.

* **Infrastructure Gap**

The rapid growth in enrolment has been supported by the completion of about 900 new classrooms each year at new and existing schools. Despite this remarkable growth, the lack of infrastructure constitutes a major constraint in Zambia. Overcrowding in classrooms continues to constraint the effectiveness of learning.

* **Post-primary School Gender Gap**

Despite notable progress in reducing the gender gap at primary school level, the continued existence of gender disparities at all post-primary school levels underscores the existence of the gender gap in education in Zambia.

# 4.0: Understanding Education Financing in Zambia (2010-2014)

* 1. Size and Focus of External Financing of Education in Zambia, 2010 – 2014

Various cooperating partners are currently involved in external financing of education in Zambia. Notable ones include Irish Aid, the British Department of International Development (DFID), the Japanese International Cooperation Agency (JICA), the United States Agency for International Development (USAID), The United Nations International Children’s Emergency Fund (UNICEF), The United Nations Education Scientific and Cultural Organisation (UNESCO) and the World Bank. In this context, the Global Partnership for Education (GPE) in 2013 approved the Ministry’s application for funding amounting to US$35.2 million for the period 2011 to 2015, with DFID as the supervising entity. Table 3.8 below provides a list of some of the key donors and amounts pledged towards the 2014 education sector budget.

**Table 3.8: External Financing to the Educational Sector Budget, 2014**

|  |  |  |  |
| --- | --- | --- | --- |
|  | Source of funds | 2014 External Financing Pledge | |
| **USD** | **Total Pledges ZWK** |
| 1 | **UNICEF** | 4,000,000 | 21,480,000 |
| 2 | **Japan** | 4,000,000 | 21,480,000 |
| 3 | **Ireland** | 9,000,000 | 48,330,000 |
| 4 | **DFID** | 25,000,000 | 134,250,000 |
|  | **Total** | **42,000,000** | **225,540,000** |

**Source**: MoE Annual Work Plan and Budget (2014)

External financing is essentially disbursed in form of budget support to the Ministry of Education national headquarters. As such, the focus of external financing has in the recent past assumed the form of budget support. In 2014, the allocation were distributed as shown in Table 3.9.

**Table 3.9: Focus of Education Budget Allocations, 2014**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| # | Component | Donor  ZWK | Government  ZWK | Total 2014 Allocation |
| 1 | Headquarters | 215.83 | 1,578.35 | 1,598.14 |
| 2 | Provincial Offices | 7.46 | 751.39 | 758.85 |
| 3 | Primary Schools | - | 4,844.00 | 4,844.00 |
| 4 | Secondary Schools | - | 1385.90 | 1,385.90 |
| 5 | Tertiary Institutions | 7.21 | 5.05 | 12.26 |
|  | Totals | 230.5 | 8,564.68 | 8,599.15 |

**Source**: Annual Work Plan and Budget (2014)

External financing in 2014 increased by K165.5 million compared to 2013, mainly due to the coming on board of DfID as well as the GPE fund. Other support to the education sector comes through various actors implementing activities that reduce the burden on the national treasury. Many donor funded projects and Non-Governmental Organisations (NGOs) are actively operating in this space[[13]](#footnote-13). However, the contribution of external financing to the education sector has generally assumed a declining trend necessitating the need for increased domestic financing of education in Zambia. The decline was marked between 2005 and 2008 when sector contribution of cooperating partners decreased from 38 percent in 2005 to 12 percent in 2008 (MoFNP, 2009: 63).

## 4.2 Size and Focus of Domestic Financing of Education in Zambia, 2010 – 2014

Total national budget allocations on education have averaged about 18 percent of the total budget for the period 2010-2014 (Figure 3.7). On a year on year basis, this has fluctuated between 17 and 20 percent of the national budget. In 2010, the proportion of the budget allocated to education was 19.2 percent. This marginally declined to 18.6 percent in 2011 and further to 17.5 percent in 2012 and 2013 before rebounding to 20.2 percent in 2014. The decline was much steep between 2010 and 2012 but recovered after 2012 (Figure 3.7 and Table 3.10).

###### **Figure 3.7: Expenditure by Functional Allocation (% of Total Expenditures), 2010-2013**

**Source**: MTEF (2014)

Overall, the allocation to the education function remained in the region of 18 percent. Admittedly, this does fall short of the Education for All Fast Track Initiative(EFA-FTI) that prescribe a benchmark of at least 20 percent of the total expenditure budget to be allocated to the educational sector. In addition to continued support for basic education, these resources went towards increased access to and quality of high school education and the recruitment of 20,000 teachers.

**Table 3.10: Total Allocations and Actual Expenditures on Education (%), 2009-2013**

|  |  |  |  |
| --- | --- | --- | --- |
|  | Allocation to education sector  (% percent of total budget) | Actual expenditure  ( as % of total expenditure) | Variance |
| 2009 | 17.12 | 18.9 | +1.78 |
| 2010 | 19.2 | 15.2 | - 4 |
| 2011 | 18.6 | 14.87 | - 3.73 |
| 2012 | 17.5 |  |  |
| 2013 | 17.5 | 12.32 | -5.18 |
| 2014 | 20.2 |  |  |

**Source**: Ministry of Finance (Budget Speeches, 2010-2015; Financial Reports, 2009-2013; Estimates of Revenue and Expenditure, 2010-2015)

**Figure 3.8: Total Budget Allocations and Actual Expenditure (%), 2006- 2014**

**Source**: Ministry of Finance (Budget Speeches, 2010-2015; Financial Reports, 2009-2013; Estimates of Revenue and Expenditure, 2010-2014)

An outstanding concern with respect to allocation to the education function is that much of these resources were, in real terms, concentrated on the first two-tiers of education i.e. primary education and secondary school (Figure 3.9). Early child development and tertiary education sectors have not been prioritised. Thus, the funding role of Government in skills development and early childhood development remained rather on the weak side throughout the EFA/MDG reference period. A related concern that can be noted from Figure 3.8 above is the observed variance between what is allocated to education and what is actually spent.

Available data, suggests that actual outturns on expenditures on education have been less than what is approved. For 2010, for instance, while the total allocation was at 19.2 percent of the national budget, only 15.2 percent of national expenditures went to education. For 2011, the budget allocation was at 18.6 percent of the national budget but what was actually spent was 14.6 percent of the total government expenditures. In 2012, the total budget allocation was 17.5 of the national budget but actual expenditures dropped further to 12.32. Thus, inadequate attention to early childhood and tertiary education and disparity between budget allocation and actual expenditures are other areas needing strong advocacy messages and action from CSOs. On declined actual budget expenditures on education, this call for protection of education expenditure allocation to ensure improved quality inclusive education. Domestic releases have been generally lower than budgeted. Further, with the exception of 2009, the country spends less than 4 percent of its GDP on education against an average spending of 5.3 percent in comparative countries. In terms of per capita GDP, Zambia spends about 8.6 percent on basic education, while the average in least developed countries is about 12.4 percent (MoE, 2009:14). Comparative countries devote 25 percent of their domestic discretionary budgets to education, compared to Zambia’s 20 percent. Advocacy messages on the need for increased financing of education will, therefore, need to be heightened.

**Figure 3.9: Trends and Patterns in Education Sub-sector Expenditures (% of GDP), 1998-2008**

**World Bank**, World Development Indicators (2010).

Figure 3.9 also reveals a generally fluctuating trend in terms of government expenditures on education as a percent of GDP. While there was a steep rise between 1999 and 2004 (due mainly to BESSIP and donor good will towards MoESP soon after the EFA/MDGs declaration), there was a decline after 2004 that does not board well with the need to ensure quality inclusive education. The Government must ensure protection of education expenditures as well as systematically ensure equity of allocation across all the tiers of the education system in Zambia. In this way, Government will enable equitable and progressive investment in education and skills development that will stand the country in good stead to meet needs of pre-school learners and the changing market demand. Of course, as it does this, it must act to improve budget transparency and accountability.

During the period 2010 to 2014, releases from cooperating partners (sector pool, including the FTI tranches) were much lower than anticipated, because of a lack of progress on a number of issues and alleged irregularities in the sector. The cooperating partners became more critical of the effectiveness of cooperation in the education sector. By the end of 2010, for instance, they showed serious concerns over the lack of progress on the introduction of targeted budget support and the lack of follow-up on the fiduciary risk assessment and a number of other issues. It appears the transparency and accountability system in the education sector is institutionally weak. Alleged irregularities, revealed by the Auditor General, confirm this conclusion. There is also a strong sense that the current sector dialogue mechanisms are not working effectively because meetings are regularly delayed or cancelled and that there is inadequate representation at appropriate levels. According to the Ministry of Education, some government institutions did not have incentives to participate. According to the Ministry, cooperating partners were on the other hand constantly revising their expectations towards government before funds could be released. However, even when the targets were met, funds were still not released and more targets would be drawn up, resulting in frustration and distrust from the government’s side. Altogether, this calls for strengthening mechanisms for transparency and accountability. There is no doubt that failure to redress major institutional challenges affecting resource management, accountability and transparency will continue to deprive the national treasury of the much needed resources to implement programmes intended to advance EFA goals.

## 4.3 Trends in Current and Potential Sources of National Revenue

Current trends in existing sources of national revenue in Zambia indicates that the major source is direct taxes (on personal income and profits). For the period 2009 to 2013, direct taxes fluctuated between USD 1.01 billion and USD 2.9 billion. Direct taxes peaked at USD 2.9 billion in 2011 but have declined thereafter to rest at USD 1.83 billion in 2013. Domestic indirect taxes constitute the second major source, followed by trade taxes and then non-tax revenues. Grants from international cooperating partner makes up the other sources. Natural resource rent (e.g., mineral royalties) have been negligible during the reference period (See Figure 3.10 below).

**Figure 3.10: Current Trends in Sources of National Revenue (USD billion), 2009- 2013**

**Source**: African Economic Outlook Database (2015)

Meeting the challenges of inclusive quality education calls for substantially scaling up the financing of local economies as well as strengthening public and private institutions. Central government will have to provide most of the funding, which can come from more effective taxation of natural resource extraction and innovative finance mechanisms. At the national level, fiscal systems must also be bolstered across the board by using transfer mechanisms, expanding the fiscal base and possibly tapping capital markets.

# 5.0: Lessons, Conclusions and Policy Recommendations

## **5.1** Key Lessons

* Importance of securing greater balance between interventions that focus on improving access and gender parity, on one hand, and those that address retention and completion rates, on the other.
* Quantitative improvement in education, while necessary, are not sufficient. Improved enrolment and progression rates should be accompanied by quality teaching staff and upgraded school facilities to improve overall quality of education.
* Improved governance through the devolution of education service delivery to local governments remains the most sustainable way of increasing local participation and accountability in education.
* Zambia’s education cannot be fully aligned to Zambia’s development needs unless it is largely domestically financed and driven.

## 5.2 Conclusions

This study has analysed current trends in progress towards achieving full enrolment, retention and quality education in Zambia and examined the situation of domestic education financing. This has been done for the purpose of identifying education gaps and opportunities that need to be carefully considered for optimising domestic revenue mobilisation towards inclusive quality education beyond 2015.

It was found that major educational infrastructural investment programmes embarked on since the mid-1990s have significantly improved the numbers of those attending basic level (primary and junior secondary) education. However, issues of quality of education have not received much attention. Overcrowding in classrooms and high pupil-teacher ratios persist. Besides, the political rhetoric surrounding Early Childhood Education (ECE) has not been accompanied by mechanisms to achieve the envisaged free and compulsory access. The sustainability of the free primary education policy remains questionable while post-basic education has not received the attention required in terms of expansion, rehabilitation, educational material support and curriculum review. Achievements in pupil performance remain low particularly in reading and mathematics while there is a mismatch between the skills coming out of the education system and the needs of the labour market. Gender gaps also exist at post-primary school levels.

On financing, it was found that the allocation to the education function remained in the region of 18 percent for the period 2010-2014 which falls short of the Education for All Fast Track Initiative(EFA-FTI) that prescribe a benchmark of at least 20 percent of the total expenditure budget to be allocated to the educational sector. An outstanding concern with respect to allocation to the education function is that much of these resources were, in real terms, concentrated on the first two-tiers of education i.e. primary education and secondary school. Early child development and tertiary education sectors have not been prioritised. The funding role of Government in skills development and early childhood development remained rather on the weak side throughout the EFA/MDG reference period. A related concern was the observed variance between what is allocated to education and what is actually spent. It was found that actual outturns on expenditures on education have been less than what is approved.

Improvements in national revenue collection would benefit the education sector as more finances would be available for allocation. Government will need to put in place mechanisms (some very basic, others more innovative) to expand its tax base. A lot of tax goes uncollected especially in the informal sectors. Concessions extended to large scale investors would need to be reviewed so as to ensure that the net effect is not merely a loss in tax revenue. The mining sector stands out as one that needs specific attention when it comes to revenue collection. It appears clear that government has so far failed to develop mechanisms that ensure that appropriate taxes can be paid.

## 5.3 Recommendations

**1. Education gaps**

* **Balanced Approach**

To further improve the Grade 7 completion rate, government needs to secure greater balance between interventions that focus on improving educational access and gender parity in enrolment, on the one hand, and those that address retention and completion rates, on the other.

* **More investments in secondary and post-secondary school infrastructure**

Although the completion rate for Grade 12 has been improving rapidly since 2009, primarily due to major improvements in school infrastructure, it is still very low. Enhancing this will require massive investments in the construction of secondary and post-secondary educational facilities, and higher recurrent budgets for the provision of books, lab and computer equipment.

* **Quality of Education**

Quantitative improvements in education outcomes, while necessary, are not sufficient. Improved enrolment and progression rates should be accompanied by quality teaching staff and upgraded school facilities to improve the overall quality of education (including improving the dwindling pass rates).

* **Youth Illiteracy**

To address illiteracy and skills development, government must work with its stakeholders and partners, including civil society organizations, private sector, academia and parent-teacher associations in pursuing policies and programmes that improve youth literacy rates, especially for females. Civil society has experience in designing flexible programmes for specific community groups, lobbying for the interests of vulnerable populations and monitoring performance. The private sector has a particular interest in an educated workforce and must be encouraged to offer more apprenticeship programmes, as well as workplace literacy and skills development

* **Higher Education**

To address the skills mismatch, Government must focus increased attention on higher education.

* **Quality and use of monitoring information**

The monitoring and evaluation functions need to be further expanded in order to become instruments for the improvement of the quality of education. The MoE can be proud of its Education Management Information System (EMIS), but this system can be used more effectively. EMIS provides basic (input) information, but this information is not linked to output and outcome information. In this regard, monitoring and evaluation functions need to be expanded in order to become instruments for the improvement of the quality of education. Information provided by the annual school census needs to be linked with information from ECZ. At the district level, the results of inspections may be computerised and linked to EMIS data.

* **Working in partnership with CSOs**

To address illiteracy, government must work with its stakeholders and partners, including civil society organizations, private sector, academia and parent-teacher associations in pursuing policies and programmes that improve youth literacy rates, especially for females. Civil society has experience in designing flexible programmes for specific community groups, lobbying for the interests of vulnerable populations and monitoring performance. The private sector has a particular interest in an educated workforce and must be encouraged to offer more apprenticeship programmes, as well as workplace literacy and skills development.

1. **Domestic financing**

The following measures would help improve revenue levels and make more resources available for quality inclusive education development:

* **Tapping into diaspora remittances**, this is an area that holds potential but is currently untapped in the Zambian case. Policy makers and the development community could explore ways to exploit this potential to leverage savings and investment in productive assets. However, more effort is needed to maximise their development impact, including by reducing their transmission costs and channelling remittances through national commercial banks to access additional finance.
* **Curbing illicit financial flows from Zambia**, which are estimated to have exceeded FDI and ODA at the continental level over the last decade, are a potential source of domestic resource mobilisation for the national economy. If curbed, they could free up resources to invest in public goods such as education.
* **Combating tax avoidance through improved monitoring capacity**. The combination of a huge informal sector, low levels of tax collection, high rates of tax evasion (low tax payer morale) and a weak tax administration all add to the challenge of fiscal reform for inclusive development. Zambia though a resource-rich countries lack the capacity to negotiate contracts, which would promote greater transparency and improve public revenue from the extractive sector. Abusive transfer pricing – the artificial movement of taxable profits from high-tax to low-tax jurisdictions – occurs on a substantial scale in Africa and there is every reason to believe it occurs in Zambia. The country should strengthen its monitoring capacity to combat tax avoidance in all its forms, particularly to curb strategies defined as “base erosion and profit shifting” (BEPS), which exploit gaps and mismatches in tax rules to shift profits for tax purposes.
* **Increasing the contribution of resource rent**, e.g., raising mineral royalty tax to realist levels.
* **Implementing property tax to expand tax base**, particularly to capture informal sector incomes.

# 6.0: Sites of Struggle for Civil Society Advocacy Beyond 2015

Going forward, the following broad thematic areas could constitute building blocks upon which ZANEC might want to anchor its lobbying and advocacy strategies:

* ***Inclusive quality education for all in Zambia;***

Despite notable strides in primary enrolment rates and expansion of schools it is clear that quantitative improvement in education, while necessary, are not sufficient. Improved enrolment and progression rates should be accompanied by quality teaching staff and upgraded school facilities to improve overall quality of education.

* ***Increased equitable and innovative domestic financing for education***

A case has been made that improvements in national revenue collection would benefit the education sector as more finances would be available for allocation. However, the message is that Government needs to put in place mechanisms (some very basic, others more innovative) to expand its tax base. A lot of tax goes uncollected especially in the informal sectors. Concessions extended to large scale investors would need to be reviewed so as to ensure that the net effect is not merely a loss in tax revenue. The mining sector stands out as one that needs specific attention when it comes to revenue collection. It appears clear that government has so far failed to develop mechanisms that ensure that appropriate taxes can be paid.

* ***Education doctrine and curriculum***

Against the background of this report’s discussion, the national education policy framework entitled *Educating Our Future: National Education Policy* (1996) may no longer be a reliable guide for the future of the education system in Zambia. As a matter of fact, the policy has already been overtaken by other powerful documents outlining where Zambia should be moving to, the Fifth National Development Plan (2006-2010), the Sixth National Development Plan and the Vision 2030. But more fundamentally, none of these documents provide clear guidelines for what is being taught in Zambian schools, neither how teachers are being trained nor how the national budget for education is designed. It is for this reason it can be argued that education priorities in Zambia seem only to prepare students for the next stage of school rather than prepare them for realistic engagement with the needs of the Zambian society today. Admittedly, curriculum at every level in the Zambian system needs some thorough re-examination and critical re-evaluation. It must be made relevant to the community needs. The curriculum must be such that good technical, crafts and vocational training is for all students, not only for the few that enroll in the Technical and Vocational Educational Training (TEVET) system.

More specifically, re-orienting the education doctrine and training system at all levels is critical in order to enhance the quality of skills required by the labour market in Zambia. In this regard, efforts to increase the supply of vocational skills and training have to be seen in the context of increased participation rates in post-secondary and university education during the 1980s and early 1990s, which were concentrated in academic studies. To redress this academic bias, Zambia ought to strengthen upper secondary and post-secondary vocational studies, create or re-inforce apprenticeship-style training, and increase the capacity for advanced technical studies by developing tertiary level polytechnic institutions. A major thrust of this initiative must be to make the education system more relevant, flexible and responsive to the emerging needs of the Zambian society and be able to prepare young people to be involved in the changes necessary to move Zambia forward in the years ahead.

* ***School enrollments and the structure of the education system***

Granted that Millennium Development Goal (MDG) number two (2) called for ensuring that all children complete primary education by 2015 and that, within this context, the Zambian Government has implemented a policy of free education for all students through Grade 7 and has extended that through to grade 9 since about 2002, the government has not followed this up with significant budget allocations to education. The results have been obvious, plenty indirect school fees and extra charges to meet school expenses that are still preventing many children from accessing education. Besides, the dearth of school infrastructure, especially in rural areas, continues to hamper enrollment levels. Admittedly, the need is urgent that government must at the very least scrap off school fees at all levels of the public education system in Zambia. Accompanying these measures must be aggressive domestic resource mobilization by the state to finance an expanded school infrastructure at every level of Zambia’s education system.

* ***Donor dependence and resource mobilisation***

The issue of donor dependency must be addressed because it is the very dependence that is one of the biggest obstacles to the development of education strategies tailored to Zambia’s own circumstances. Zambia needs to decrease the level of dependence and take control of its own educational policy and planning. Of course this does not mean that Zambia should not receive financial assistance from abroad, but does mean that the control of policy development, policy monitoring and evaluation and planning should be indigenised. Foreign funding and expertise should only be used if it is prepared to play a supportive and not a decision-making role. The government must therefore embark on intensive domestic resource mobilisation strategies. Appropriate and decisive taxation of the mining sector can provide for resources for state financing of education in Zambia. Another window of revenue opportunity is the gemstone industry that needs to be brought into the tax net. Further, the personal income tax base is restricted to only 12 percent of people at work – those in the formal sector. A huge revenue reservoir to the tune of about 88 percent of people at work is still untapped. In short, Zambia needs to be liberated from the grip of the external financing and thus, become more responsible to her people. Developing alternatives that will bring true educational benefits to her people will require a radical breakaway from donor dependence.

* ***Stakeholder involvement and popular forums***

Government should involve all stakeholders in an-going and broad based consultation on education priorities. This does not mean that every decision should be the result of a mass meeting or vote, or that professionals and experts should be marginalized. What it does mean is that institutionalized forms of broad-based consultation should be established to ensure that government is aware of popular opinion when important policy decisions are made and that channels exist for dialogue between government and the people. Alternatively, where popular forums are established independently of government, governments should be prevailed upon to recognize them and even to pass legislation to compel organs of government administration to consult with popular forums in the development of educational policies. These forums could be established at various levels of the educational system: schools, local district, provinces and at national level.

* ***Education and training research***

Zambia needs to increase research into the problems of its own education system to find the most cost-effective and appropriate means for overcoming them, rather than following the latest (and often rapidly changing) fads of the World Bank and donor countries. This needs to be accompanied by improved cooperation and constant dialogue between departments of education and the research community as well as by region-wide research. In addition, research must be informed and have respect for the knowledge systems and ambitions of local communities and the willingness to discover these through a process of dialogue. It must also be informed by and have respect for the work of the world’s leading minds in the field of pedagogy, curriculum theory, psychology, social theory, management and leadership studies and other relevant fields. In this regard, it is important not to privilege western scholars at the expense of African and other third world scholars.

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1. Zambia is a landlocked republic situated in south-central Africa, with a surface area of 752,614 square kilometres and is bordered by eight neighbouring countries: the Democratic Republic of the Congo to the north, Tanzania to the north-east, Malawi to the east, Mozambique, Zimbabwe, Botswana and Namibia to the south and Angola to the west. Administratively, Zambia is divided into ten provinces, each administered by an appointed deputy minister. Each province is subdivided into several districts. [↑](#footnote-ref-1)
2. Since the early 1990’s, Zambia had accumulated an external debt of USD 7.1 billion that made debt servicing a heavy burden on the GRZ’s ability to finance both its recurrent and development programmes. However, through the highly indebted poor countries (HIPC) and multilateral debt relief initiatives, Zambia’s external debt was reduced to USD 635 million by the end of 2006. Foreign direct investment remained modest for a long time in the 1990s, partly due to an investment climate characterized by high levels of corruption and investors’ fears of nationalization of assets. More recently this has changed, particularly since countries in the South have increased their economic involvement in Zambia. Net foreign direct investment (FDI) and portfolio investments have been growing steadily since 2009. [↑](#footnote-ref-2)
3. These are discussed elsewhere in this report. [↑](#footnote-ref-3)
4. The focus is on the period 2000-2015 [↑](#footnote-ref-4)
5. In 1990, the International Literacy Year, about 1,500 delegates from 155 countries and representatives of some 150 governmental, non-governmental and intergovernmental organizations met at the World Conference on Education for All in Jomtien, Thailand, and called upon all countries to universalize adequate basic education. The Conference participants adopted the World Declaration on Education for All and a Framework for Action: Meeting Basic Learning Needs. Emphasis was placed not only on **access to basic education**, but also on the **quality of education** and **actual learning outcomes**. [↑](#footnote-ref-5)
6. This policy document is not without criticisms, however. Part of the criticism is that neo-liberal principles on which it is founded cannot lead to a more relevant education for Zambia (See ANSA, 2008 for a fuller discussion on this line of criticism). [↑](#footnote-ref-6)
7. Until 2003, sector support had mainly been restricted to funding basic education, but the MoESP paved the way for sector support. In February 2003, the Ministry of Education and nine development agencies signed a Memorandum of Understanding (MoU) based on the MoESP. The ten agencies coordinated their support in the sector pool. The sector-wide approach within education was part of the harmonisation process that was beginning to take shape in 2002. This process aimed at enhancing the effectiveness and efficiency of development cooperation by promoting cooperation and alignment. [↑](#footnote-ref-7)
8. Early Childhood Care Development and Education services can be seen as taking up two distinct phases: one for 0-36 months (day care services/crèches) and the formal early childhood education period for children 36-72 months. [↑](#footnote-ref-8)
9. Ministry of Education, Science, Vocational Training and Early Education (2012). Education Sector National Implementation Framework III 2011-2015, Lusaka, Zambia. [↑](#footnote-ref-9)
10. Improved primary school net enrollment is linked to several factors: development of school infrastructure, introduction of free education, relaxing the uniform policy, formalisation of community schools, re-entry policy, upgrading of primary schools, sustained teacher recruitment and the growth of private schools (MoE, 2012). [↑](#footnote-ref-10)
11. The primary completion rate is a measure of the quality of the educational system. It also helps to gauge the success of the system in curbing drop outs and improving retention, thus keeping children in school to complete their primary education (ECA/UNDP, 2012). [↑](#footnote-ref-11)
12. Students over 18 years can still be at school. Age is not a discriminatory factor; however, the school census from 2000 to 2014 do not give figures for the population over 18 years old still enrolled at school. [↑](#footnote-ref-12)
13. These include JICA, African Development Bank, USAID, CAMFED, ChildFund Zambia, World Bank, Educational Development Centre, Plan International, Save the Children, Room to Read, Ischool, sightsavers. [↑](#footnote-ref-13)